

**Performance Excellence**  
Continuous Improvement

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# Local Government Kaizen Event Report Out

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**By: Room 19 Number Crunchers**

June 25-29, 2007

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# Background

Dick Oshlo

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# Team

Jeff McKern



# Team Members

**Mike Rohlf -Team Leader**

## **Members:**

■ Lisa Oakley	IDOM
■ Steve Ford	IDOM
■ Mike Albers	IDOM
■ Jim Nervig	IDOM
■ Joel Lunde	IDOM
■ Dick Oshlo	IDOM
■ Lisa Michelson	IDOM
■ Verne Logan	IDOM
■ Jeff McKern	IDOM
■ Joel Gabrielson,	IDR
■ Jake Grandia	Marion County Auditor

## **Observers**

Ruth Ann Bunce (Deere Credit)  
Ann Hogle (IA Vets Home)  
Christine Brittain (DNR)  
Scott Vander Hart IDOM

## **Consultant**

Jim Scott - Consultant

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# Scope

Mike Albers

- This event will address the local government analyst work processes from the time the annual property valuation collection letter and the local budget instructions letter go to local governments to the time tax levies are certified.
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# Objectives

Verne Logan

- **Establish standard work for local government budget analysts**
  - **Equalize distribution of work among local government budget analysts**
  - **Develop increased flexibility within the workforce to back up co-workers**
  - **Inform ourselves and others of the local government budget process**
  - **Eliminate waste and re-work**
  - **Improve communication within the team**
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# Goals

**Steve Ford**

- **Identify and map the current local budget processes**
  - **Eliminate duplicative processes**
  - **Improve access by public to local government information**
  - **Migrate to a common web based IT platform**
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# Kaizen Methodology

**Mike Rohlf**

- **Clear objectives**
  - **Team process**
  - **Tight focus on time**
  - **Quick & simple**
  - **Necessary resources immediately available**
  - **Immediate results (new process functioning by end of week)**
  - **5S “mindset”, use the steps to support the event activities**
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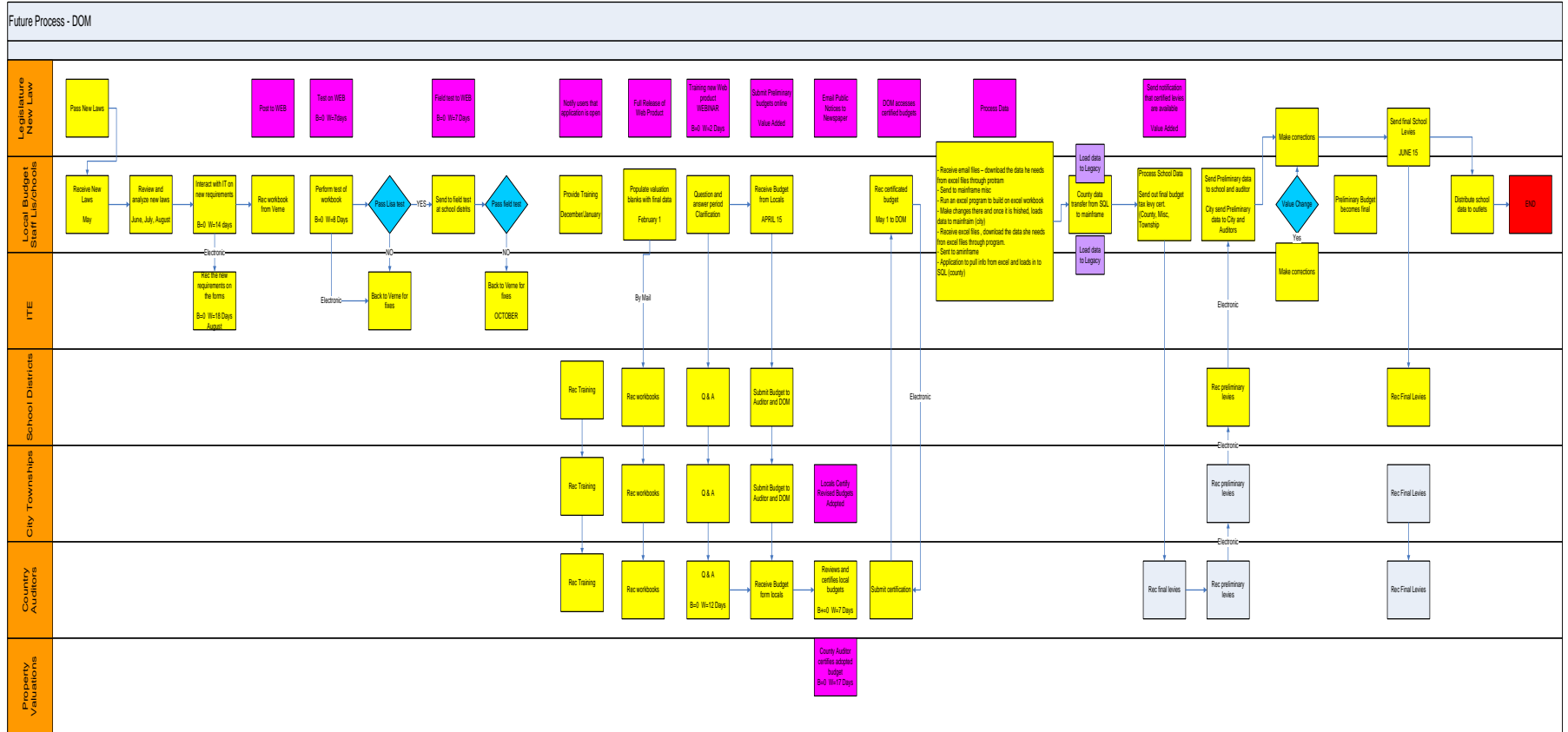
# Old Process

Lisa Michelson



# New Process

Joel Lunde



# Results

Joel Gabrielson

	Valua- tions	Schools	Cities	Counties	Twps	Misc.	Total
Total Delays	6	1	1	6	6	4	24
Best Case	0	0	0	0	0	0	0
Worst Case	37	30	28	26	56	27	204
Total # of Steps	45	32	28	30	28	27	190
Total # of Decisions	6	2	4	3	1	0	16
Total # of Value Added	2	3	3	2	3	2	15
Total # of Handoffs	18	13	13	11	14	9	78

# Results-New Process

Joel Gabrielson

	NEW PROCESS	WEB PROCESS
Value Added	2	2
Handoffs	11	10
Decision Points	3	3
Delays	5	5
Tasks	52	13
Best Case	0	0
Worst case	64	37

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# **Vision of Web based process**

**Jim Nervig**

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# Process Time Line

Mike Rohlf

- **Receive new laws—May 31**
- **Review/analyze laws--July-Sept.**
- **Interact with IT, receive workbook from IT through field test – August-September**
- **Back to IT for fixes-October**
- **Populate valuation blanks with final data—Feb**
- **Receive budget from Local Governments– April 15th**
- **Required to receive Certified Budgets – May 1st**
- **Send final school levies – June 15th**

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# Recommendations for Further Action

Lisa Oakley

## Legislative

- **Penalty for non compliance with Jan 1<sup>st</sup> valuation certification date, by county auditors to DOM.**
  - **Auditors certifies budgets by May 1<sup>st</sup>.**
  - **All local Government budgets are certified by April 15.**
  - **Change the Hearing Notice publication date to 4/20.**
  - **Eliminate the need to provide proof of publication for budgets.**
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# Homework

## Mike Rohlf

Item	Item Description	Person Responsible	Due Date
1	Legislative changes	DOM	May 2008
2	Training	Local Government Staff	Dec/Jan 08/09
3	Communication / Buy-in plan	IDOM	August 2007
4	Electronic signature feasibility	Verne Logan - IT	August 2007
5	Design for Web Based System	Dick Oshlo Verne Logan	Start: July 2007
6	Narrative for the new process.	Jim Nervig Mike Albers Lisa Oakley Steve Ford Verne Logan	August 15, 2007



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# **Team Member's Experience**

**Verne Logan**

**Jake Grandia**

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# **Comments**

**Jim Scott-Consultant**

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**We welcome your  
questions and comments!**

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